

Lucy Archer- Action Plan

Established 3.26.2024

This plan has been designed to outline areas of responsibility for Lucy to focus on over the next 30 days in order to succeed in her role as Admin Assistant.

Communication

Recently, employees have expressed concerns regarding Lucy's communication. Lucy has not been responding to email requests in a timely manner. She has also not kept others informed of the status of projects she is involved with.

Lucy must engage with staff more consistently and timely.

- Lucy will create checklists daily for herself to complete during her workday to ensure that tasks are being completed, and she remains on track.
- Lucy will check in with each staff member on a weekly basis to provide an update on work progress and be available to address concerns and questions.
- Lucy will respond to emails within 48 hours of receipt.

30 Day Progress:

Lucy has been successfully completing daily checklists for herself, which has improved her productivity.

Lucy has been meeting with some staff members on a weekly basis, but not all.

Lucy has been consistently responding to emails within 48 hours.

Inventory Management

Lucy's department is often running out of product. Upon inspection, Lucy's Master Inventory List is not up to date with all current products.

- Lucy will revise the Master Inventory List so it is clear and concise.
- Lucy will conduct Inventory every Friday.
- When product is added or removed from inventory, the Master List will be updated immediately.
- Lucy will reach out to 2 new vendors to get product pricing for our top 3 most used products. She will compare these quotes to our current vendor's pricing and delivery times and make a recommendation to her Manager to help with maintaining appropriate product inventory level replenishment and cost management.

30 Day Progress:

Lucy has updated her Master Inventory list and conducted 2 inventories in the last 4 weeks.

She has made contact with 2 other vendors to get quotes on products but has not put together a recommendation for her Manager to review.

Cleanliness of Work Area

Lucy's office is messy and cluttered. There are boxes stacked on the floor, blocking doorways and walking paths.

It is Lucy's responsibility to ensure that her workspace is clean, safe and comfortable for her and others.

- Lucy will clear and organize her workspace.
- Lucy will remove all obstacles from doorways and walking paths.
- Lucy will contact the housekeeping department to establish a schedule for floor cleaning and trash removal.

30 Day Progress:

Lucy's office has been cleaned and decluttered. Boxes have been removed from doorways and walking paths.

Lucy has not yet reached out to housekeeping to set up a cleaning schedule.

Attendance

Lucy has been late to work numerous times over the last 2 months. She has not notified her Manager of her tardiness, per the attendance policy.

Lucy has also missed 2 team meetings and 6 daily meet ups in the last 2 months. It is important for Lucy to attend these meetings to understand the operations of the department and the company.

- Lucy will arrive to work on time, ready to work for her scheduled shift.
- Lucy will attend all team meetings and daily meet ups.
- If anything arises and Lucy will not be on time or in attendance for her shift or these meetings, she will notify her Manager immediately.

30 Day Progress:

Lucy's attendance has improved. She has only been tardy to work twice in the last 30 days, each time notifying her Manager.

Lucy has attended all team meetings and Daily meet ups except one. In this instance, she did not notify her Manager. When her Manager inquired, she explained that she had a personal emergency.

Mandatory weekly follow up meetings with Lucy's Manager are required to discuss Action Plan progress. These meetings will be held on Tuesdays at 9am.

Details from each of these meetings are included in Lucy's Action Plan file.

Lucy holds a key position with the company and it is imperative that she improves her communication, Management of Inventory, Office Cleanliness and Attendance over the next 30 days in order to continue to fulfill her responsibilities and remain in her position as Admin Assistant.

In summary.....

What should we do with Lucy?

Signature_____ Date _____

Witness _____ Date _____